# Xactimate **User** Certification

Verisk currently offers three levels of user certification for Xactimate to independently verify a user's product knowledge and proficiency. Each level of certification increases in difficulty and is considered a prerequisite for the next level.

**Please note: Certification exams may be taken once for up to a year following purchase. Certification is valid for two years.**

## Level 1 Certification – Xactimate Fundamentals

### Buy Exam

Verifies that a user has the foundational skills required to create an estimate from start to finish in Xactimate.

### Certification knowledge requirements

The Level 1 Certified individual will be required to demonstrate that the following learning objectives have been met:

- Demonstrates understanding of the 4-step estimating process, connecting to XactAnalysis, downloading assignments, Projects tab, Control Center.
- Demonstrates understanding of Claim Information including: insured name, multiple addresses/phone numbers, estimator/reference info, policy/claim info, deductible, price list, tax jurisdiction, activity defaults, overhead and profit, company header.
- Can complete and print an estimate in Xactimate.
- Demonstrates understanding of Sketch windows, Tools, Search pane, Sketch workspace, Items section, View Tools, Plan View, Zoom to Selection, Zoom In, Zoom to Extents, Pan Tool, 3-D View.
- Demonstrates understanding of Room Features, such as Wall Handle, Wall Thickness, Interior/Exterior Dimensions, Room Properties, Ceiling Type/Height, Square Break Tool, Custom Staircase Tool, Doors, Windows, Sign/Click and Drag method, Deduct Openings, Missing Walls, Basic Room Variables F, PF, W, WC, C PC.
- Demonstrates understanding of Estimate Items, Quick Entry, Grouping, Search/ Macros, Category code, Selector code, Activity, Description, Calculation, Unit Price, Unit of Measure, Click for Detail, Reference/Keyword Search, Home Link, Predictive Text.
- Demonstrates understanding of marking an estimate "Completed," required information, changing estimate status to "Completed," Print Options, View/Print Reports, Export/Email PDF File, types of Estimate Reports.
- Demonstrates understanding of Measurement View, Measurement Locks, Roof Annotations, Roof Tool, Roof Properties, Roof Types, such as Gable, Flat/Shed, Hip, Partial Hip, Dutch Hip, Half Hip, Gambrel, Barrel, Turret, Manual, Square Break Tool, Roof Overbuild, Roof Subgroup, basic roof variables SQ, SF, P, R.

- Demonstrates understanding of the Projects tab, Xactimate Help, Data Transfer, Sharing/Copying Data such as estimates, price lists, and macros.
- Demonstrates understanding of the three methods for updating prices, price list updates, naming convention of a price list.

## Certification Exam

The Level 1 Certification Exam is divided into three different sections, as follows:

1. **Sketch and Scope Lab**: In this hands-on lab, individuals are required to use their own locally installed Xactimate (or Online version) to create an estimate. The most recent version of Xactimate is required. The estimate consists of a Sketch and scope scenario that must be completed accurately. The estimate will be used to answer the questions found in the Practical Exam section. The Sketch and Scope labs are not timed, and individuals may exit and return to the lab as needed prior to beginning the Practical Exam and Knowledge Exam. The approximate time required to complete this section is 60−120 minutes.
2. **Practical Exam**: In this section of the exam, individuals are asked 30 questions pertaining to the estimate created in the Sketch and Scope labs. Questions are specific to the scope, quantities, dimensions, and pricing from the estimate. This section of the exam is timed. The approximate time required to complete this section is 30 - 90 minutes. Passing grade is 70%.
3. **Knowledge Exam**: This portion of the exam consists of 30 multiple-choice, true/false, and matching questions. Questions are related to the learning objectives listed below in the Knowledge Requirements section of this document. This section of the exam is timed. The approximate time required to complete this section is 30 - 90 minutes. Passing grade is 70%.

## Certification Exam Preparation

Prepare for the level 1 certification exam with our educational resources:

- **Xactimate Fundamentals and Proficiency eLearning course**: Take advantage of Xactware Classroom and work through the course designed to teach you the skills necessary for the level 1 exam.
  - Access Xactware Classroom
- **Attend an Xactimate Training Class**: Xactimate training classes are offered in a variety of convenient forms, including self-paced, virtual classroom (Online), and classroom formats.
  - Find a class
- **Review the Xactimate Training Workbook**: This workbook is a great resource to help prepare for the Level 1 Certification Exam.
  - Order a workbook
- **Online Certification Preparation Course**: This two-hour refresher course will help prepare an individual for the exam. Class participants will be taught individually by one of Verisk's certified trainers.
  - Register for a preparation course

# Level 2 Certification – Xactimate Proficiency

[Buy Exam](#)

Confirms that a user has mastered the foundational Xactimate concepts as a power user and can use more intermediate Xactimate practices to increase their productivity, efficiency, and accuracy.

## Certification knowledge requirements

Certified individual will be required to demonstrate that the following learning objectives have been met:

- Demonstrates understanding of Claim Info, Contact Manager/Import from Contacts, Parameters, Depreciation Options, Tokens, Opening and Closing Statements.
- Demonstrates understanding of Room Properties, Relation to Level, Ceiling Type, Orientation Tool, Sketch Staircases, Square Break Tool (click + drag method), Vertex Tool, Wall Tool, Reference Areas and Blocks, Missing Wall, Room Variables LL, HH, SH, V.
- Demonstrates understanding of Multiple Levels, Level Properties, Sketch Options (measurements, font size, reset window views, keyboard shortcuts), Sketch Images Window/Add/Load Digital Images, Sketch Image Reference, Annotation Ribbon.
- Demonstrates understanding of Grouping Members (Append, Insert, Attach), Quick Entry, Search for Line Items, Retrieve Scope, Coverage Association, Depreciation Options, Dwelling Coverages, Activity Information, Miscellaneous Items, Line Item Attachments, Subvariables/Calculations, Calculate Waste (F*1.15), Global Changes Wizard.
- Demonstrates understanding of Estimating from Sketch, Estimating Windows, Searching for Line Items, Selecting Surface Areas, Adding Items Graphically, Floor Covering Tools, Sketch Items List.
- Demonstrates understanding of Estimate Items Window, Quick Entry Method, Quick Entry Navigation, Column identification.
- Demonstrates understanding of Estimating in Sketch, Item Information Window, Common Roofing Materials, Adding Roofing Line Items in Sketch, Calculating Waste for Roofing Shingles, Manually Calculating Waste SQ*1.15.
- Demonstrates understanding of Locking/Unlocking Roof Measurements, Roof Properties (Roof Rafters, Ridge, Span), Multiple Roof Slopes and Shapes, Roof Overbuilds, Commercial Roof Shapes, Roof Variables VAL, HIP, EAVE, RAKE.
- Demonstrates understanding of Elevation Grouping Member, Dimensioning an Elevation, Adding Line Items to Grouping Members, Variables Association, Reference Search on Exterior.
- Demonstrates understanding of Change Estimate Status from In Progress to Completed, Complete, Submit Required Information, Correct Inspection Violations, Mark Estimate Completed, Print Report, Upload Assignment.
- Demonstrates understanding of Project Preview, Duplicating/Copying Projects, Quick Copy, Merge Projects, Save and Save As, Re-sequence Line Numbers, Recycle Bin, Project Defaults.
- Demonstrates understanding of Download Historical Price Lists, Provide Pricing Feedback, Components, Supporting Events, Labor Minimums vs. Base Service Charges, Price Changes.
- Demonstrates understanding of Creating Macros, Retrieving Macros, Pre-built Macros in Sketch, Sketch Templates (use existing, rotate, flip).
- Demonstrates understanding of Data Transfer types, such as projects, price lists, company headers, model statements, contacts, and references; Version Compatibility, Transfer Type: Folder, XactAnalysis, Cloud, Can drag and drop (send) data, Can choose to skip, merge/rename, or overwrite items.

- Demonstrates understanding of Print Reports, Estimate Reports, Info Tab, Print Options, Line Item Detail, Sketch Images, Claim Reports, Documents, Report Macros, Uploaded Documents, Additional Options, Language Selection, Take-off Reports, Print Images on Report.

## Certification Exam

The Level 2 Certification Exam is divided into three different sections, as follows:

1. **Sketch and Scope Lab:** In this hands-on lab, individuals are required to use their own locally installed Xactimate (or online version) to create an estimate. The most recent version of Xactimate X1 is required. The estimate consists of a Sketch and scope scenario that must be completed accurately. The estimate will be used to answer the questions found in the Practical Exam section. The Sketch and Scope labs are not timed, and individuals may exit and return to the lab as needed prior to beginning the Practical Exam and Knowledge Exam. The approximate time required to complete this section is 60 - 120 minutes.
2. **Practical Exam:** In this section of the exam, individuals are asked 30 questions pertaining to the estimate created in the Sketch and Scope labs. Questions are specific to the scope, quantities, dimensions, and pricing from the estimate. This section of the exam is timed. The approximate time required to complete this section is 30 - 90 minutes. Passing grade is 70%.
3. **Knowledge Exam:** This portion of the exam consists of 30 multiple-choice, true/false, and matching questions. Questions are related to the learning objectives listed below in the Knowledge Requirements section of this document. This section of the exam is timed. The approximate time required to complete this section is 30 - 90 minutes. Passing grade is 70%.

## Certification Exam Preparation

Prepare for the level 2 certification exam with our educational resources:

- **Xactimate Fundamentals and Proficiency eLearning course:** Take advantage of Xactware Classroom and work through the course designed to teach you the skills necessary for the level 2 exam.
    - [Access Xactware Classroom](#)
- **Attend an Xactimate Training Class:** Xactimate training classes are offered in a variety of convenient forms, including self-paced, virtual classroom (Online), and classroom formats.
    - [Find a class](#)
- **Review the Xactimate Training Workbook:** This workbook is a great resource to help prepare for the Level 1 Certification Exam.
    - [Order a workbook](#)
- **Online Certification Preparation Course:** This two-hour refresher course will help prepare an individual for the exam. Class participants will be taught individually by one of Verisk's certified trainers.
    - [Register for a preparation course](#)

# Level 3 Certification – Xactimate Mastery

Validates that the user has full mastery of the Xactimate estimating system and can be considered an Xactimate subject matter expert.

## Certification knowledge requirements

Certified individual will be required to demonstrate that the following learning objectives have been met:

- Can manage and input pertinent Claim Info and Estimate Parameters, including: Notes, Details, Labor Burdens, Advance Payments, Tag visibility, Market Condition distribution and ability to import Contact information.
- Demonstrates understanding of the Sketch Construction features and views.
- Can accurately identify and configure pricing features such as: Price Lists, Unit Price, Component Prices, Line Item Total, Estimate Parameters, Sales Tax, Supporting Events, Labor Minimums, View Reports, Net Claim, and Coverages.
- Can demonstrate understanding of advanced Sketch navigation and techniques including: window repositioning, adding Sketch tabs, room dimensioning, changing colors and textures, and importing floor plans.
- Demonstrates understanding of advanced Estimate Items navigation and scoping techniques including: simultaneously adding items to multiple rooms, using Grouping Filters and Item Scenarios.
- Demonstrates understanding of techniques to estimate in Sketch including use of the Add Line Item pad and adding graphical representations for line items.
- Demonstrates understanding of exterior estimating techniques including: creating a building footprint, generating exterior walls from a roof, using multiple sketch pads, drawing elevations in Sketch and using exterior level variables.
- Demonstrates understanding of Deck and Fence estimation tools found in Sketch.
- Can demonstrate understanding of inspections that take place when completing and printing an estimate.
- Demonstrates understanding of administrative features associated with Preferences, Projects, and Data Transfer.
- Demonstrates understanding of reports and document upload techniques including: Report Macros, Merging Reports, Attached Docs, Template Docs, Custom Sketch Views, Report Scenarios.
- Can diagram a multi-level structure in Sketch using the following: Complex Room Shapes, Multiple Ceiling Types, Arced Walls, Free-standing Walls, Custom Staircases, Custom Wall Openings, Decks, Orientation Tool, Reference Areas/Blocks, Subgroups, Level Variables C, IW, F, EW, TSF.
- Can accurately identify and configure Sketch settings using the following: Deck Construction, Footing Construction, Railing Construction, Room and Wall Construction, Staircase Construction, Floor Covering Properties, and Roof Construction.
- Can accurately draw a roof Sketch using the following: Complex Roof Shapes, Multi-Level Roofs, Roof Properties, Roof Types, Square Break Tool, Roof Overbuild, Dormers, Multiple, Multiple Roof Levels, Vertex Tool, Subgroups, Roof Variables RSQ, SF, P, R, VAL, HIP, EAVE, RAKE.
- Can estimate in Sketch and Estimate Items using the following: Reference Search, Keyword Search, Related\Similar Items, Graphical Estimation, Subgroups, Multi-Room Item Entry, Macros, Flooring Tools, Custom Calculations, Reference Block/Area Behaviors, and Sketch Construction.
- Can estimate Roofs in Sketch and Estimate Items using the following: Reference Search, Keyword Search, Related\Similar Items, Graphical Estimation, Subgroups, Single Roof Faces, MultiRoof Item Entry, Item Property Editor, and Roof Waste.

## Certification Exam

The Level 3 Certification Exam is divided into three different sections, as follows:

1. **Sketch and Scope Lab:** In this hands-on lab, individuals are required to use their own locally installed Xactimate (or Online version) to create an estimate. The most recent version of Xactimate is required. The estimate consists of a Sketch and scope scenario that must be completed accurately. The estimate will be used to answer the questions found in the Practical Exam section. The Sketch and Scope labs are not timed, and individuals may exit and return to the lab as needed prior to beginning the Practical Exam and Knowledge Exam. The approximate time required to complete this section is 120 - 240 minutes.

2. **Practical Exam:** In this section of the exam, individuals are asked 30 questions pertaining to the estimate created in the Sketch and Scope labs. Questions are specific to the scope, quantities, dimensions, and pricing from the estimate. This section of the exam is timed. The approximate time required to complete this section is 30 - 90 minutes. Passing grade is 70%.

3. **Knowledge Exam:** This portion of the exam consists of 30 multiple-choice, true/false, and matching questions. Questions are related to the learning objectives listed below in the Knowledge Requirements section of this document. This section of the exam is timed. The approximate time required to complete this section is 30 - 90 minutes. Passing grade is 70%.

## Certification Exam Preparation

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- **Attend an Xactimate Training Class:** Xactimate training classes are offered in a variety of convenient forms, including self-paced, virtual classroom (Online), and classroom formats.
  - [Find a class](#)
- **Review the Xactimate Training Workbook:** This workbook is a great resource to help prepare for the Level 1 and 2 Certification Exam.
  - [Order a workbook](#)
- **Review the Xactimate Mastery Training Workbook:** This workbook is designed specifically to give users exercises that demonstrate a level 3 competency level in Xactimate.
  - [Order a workbook](#)
- **Online Certification Preparation Course:** This two-hour refresher course will help prepare an individual for the exam. Class participants will be taught individually by one of Verisk's certified trainers.
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